Midyear Fleet Registrations

'88 vs. '89 Model Year: The First Six Months

MODEL	1988 Model Year Total	1988 1st 6 Mos MYTD	1989 1st 6 Mos MYTD
SUBCOMPACT			
323	—	477	2,330
Cavalier	72,095	42,139	41,238
Colt	1,218	752	469
Escort/Festiva	45,688	29,366	36,094
Fiero	982	509	150
Firenza	3,548	2,632	67
I-Mark	—	643	832
LeMans	5,804	3,316	1,628
Mirage	1,122	736	4,580
MR2	1,463	838	360
Mustang	20,907	11,813	21,276
Nova/Geo Prizm	5,870	3,493	3,201
Omni	5,000	2,692	2,033
Probe	8,896	—	10,038
Pulsar NX	3,087	1,546	1,086
Sentra	41,135	13,862	18,034
Skyhawk	3,154	2,028	1,642
Spectrum	5,058	3,323	3,171
Sprint/Geo Metro	10,798	8,157	3,367
Sunbird	12,458	7,747	12,670
Tercel	10,333	6,219	6,992
Tracer	8,661	6,599	3,408
Total Subcompact	**267,277**	**148,887**	**174,666**
COMPACT			
200 SX	3,140	704	5,138
626	—	3,385	2,400
Aries	35,242	23,051	21,232
Beretta	55,451	12,313	12,600
Cutlass Calais	11,488	6,741	7,703
Camaro	5,229	2,770	2,525
Celica	9,950	5,655	3,558
Conquest	70	147	8
Cordia/Eclipse	214	148	295
Corolla	3,446	1,648	1,506
Corsica	55,451	20,197	30,959
Daytona	2,357	1,524	1,384
Firebird	3,488	2,025	1,291
Galant	808	378	1,501
Grand Am	43,394	29,953	40,010
Lancer	1,158	724	453
LeBaron GTS	2,269	1,509	483
Laser	—	—	23
Medallion	40	20	27
Precis	1,593	226	1,688
Reliant	34,662	24,759	17,002
Sentra Sport Coupe	918	535	224
Shadow	35,176	16,631	14,578
Somerset/Skylark	5,949	3,107	3,457
Stanza	5,468	2,441	1,980
Starion	189	92	51
Sundance	30,348	13,226	14,776
Tempo	87,650	50,374	49,741
Topaz	21,309	12,444	14,967
Vista	183	147	125
Total Compact	**456,640**	**234,082**	**251,865**

MODEL	1988 Model Year Total	1988 1st 6 Mos MYTD	1989 1st 6 Mos MYTD
INTERMEDIATE			
600	170	8,219	55
6000	39,708	20,563	15,396
Camry	32,715	18,813	23,188
Caravelle	9,600	7,540	35
Celebrity	82,926	44,237	39,440
Century	26,814	15,316	21,531
Cougar	17,540	11,000	10,106
Cutlass Ciera	46,593	26,240	30,874
Cutlass Supreme	12,938	4,604	16,592
Dynasty	23,598	9,539	37,838
Grand Prix	14,166	5,102	19,292
LeBaron	6,614	5,709	32
LeBaron Coupe	5,129	4,401	5,542
LeBaron Convertible	6,099	4,402	9,540
Lumina	—	—	1,140
Maxima	11,471	4,933	10,394
Monte Carlo	1,720	1,216	76
MX-6	—	516	672
New Yorker	16,912	1,368	6,480
Premier	801	268	1,226
Regal	18,868	11,218	9,100
Sable	41,253	18,530	16,571
Sigma	145	65	132
Taurus	158,200	75,682	73,139
Thunderbird	29,617	19,482	13,147
Total Intermediate	**603,397**	**318,963**	**361,541**
STANDARD			
Bonneville	35,528	16,969	10,810
Caprice	58,637	26,365	20,441
Crown Victoria	38,636	18,104	15,158
Delta 88	39,787	16,336	11,164
Diplomat	11,809	3,816	3,870
Fifth Avenue	16,180	14,385	291
Gran Fury	8,370	2,543	3,221
Grand Marquis	12,964	7,056	6,275
LeSabre	29,638	16,457	13,109
Total Standard	**251,549**	**122,031**	**84,339**
LUXURY			
300 ZX	4,060	1,766	1,046
929	—	558	426
98 Regency	12,244	6,494	4,785
Allante	1,179	544	329
Cimarron	336	191	48
Cressida	2,038	1,294	2,612
Continental	8,084	3,481	8,736
Corvette	3,767	1,628	1,344
DeVille/ Fleetwood	33,090	19,497	19,556
Eldorado	2,702	1,222	2,115
Electra	16,328	11,078	5,293
Fleetwood Brougham	9,565	7,195	5,101
Mark VII	4,127	2,060	2,093
New Yorker Landau	4,575	1,410	12,298
Reatta	323	—	546
Riviera	2,315	1,552	964
Scorpio	1,436	482	426
Seville	8,956	5,053	5,035
Town Car	48,436	28,236	23,519
XR4Ti	717	80	255
Toronado	2,883	1,116	536
Total Luxury	**167,161**	**94,937**	**97,063**
Total Fleet	**1,746,024**	**918,900**	**969,474**

PRESS-TIME NOTE: Mazda 626 is intermediate.

STUDY

Fleet managers are less likely to allow drivers' family members to drive a company-provided vehicle than in previous years. Accordingly, the monthly fleet mileage considered to be personal use has dropped by almost one-third since 1987.

NAFA's 1989 Personal Use Survey

The National Association of Fleet Administrator's 1989 Personal Use Survey shows that nearly 90 percent of the surveyed U.S. fleet managers allow drivers to use company-provided cars, an increase of almost three percent from 1988.

Altogether, 527 fleet managers in the U.S. responded to this year's survey, representing a total return of 29 percent.

Once again, the "Government" industry classification had the most responses, followed by the "Industrial Manufacturing" industry. The "Drugs and Cosmetics" and "Insurance" categories were third and fourth, respectively, switching places from last year.

United States fleet managers in this survey control 261,734 leased vehicles and 225,065 company-owned vehicles, for a total of 486,799. The average vehicle is driven 2,826 miles every month, and 399 miles (14.1 percent) are considered personal use.

Almost half of the respondents state a company-provided vehicle is assigned to an employee based upon title. Another 25 percent say employees are assigned a company vehicle based on the amount of business mileage driven every year. (The average yearly mileage needed to qualify for a company vehicle was 12,411.) The remaining respondents assign vehicles as either a fringe benefit (13.3 percent) or base the decision on some "other" factors (11.9 percent).

Almost 90 percent of fleet managers said their employees can use a company-provided vehicle for personal use, and more than 70 percent said the employee's spouse can use a company vehicle. Also, 30 percent allow the employee's licensed children to use a company vehicle.

Additionally, of the employees allowed to use a company vehicle for personal use, more than 94 percent have free reign to drive the vehicle wherever they want. Just more than one percent can only drive the ve-

What is the total mileage a driver puts on an average company vehicle each month?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S. (miles)	2,899	2,220	2,323	1,877	1,998	2,201	4,277	2,050	1,823	2,149	1,719	1,838	1,475	2,826

What is the average personal mileage driven by employees on company vehicles each month?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S. (miles)	532	304	528	643	376	359	257	406	391	332	360	799	383	399

Percent of total monthly mileage considered to be used for personal use.

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S. (miles)	18.4%	13.7%	22.7%	34.3%	18.9%	16.3%	6.0%	19.8%	21.5%	15.5%	20.9%	43.5%	25.9%	14.1%

Who is allowed to use a company vehicle for personal use?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S.														
Employee	49	38	28	10	45	65	42	33	66	50	16	6	8	456
Employee's Spouse	46	22	6	6	39	59	0	20	64	42	8	6	5	323
Employee's Licensed children	24	12	4	4	20	28	0	6	16	19	3	1	3	140
Others	6	6	6	4	7	3	10	4	4	6	2	1	2	61
No one, personal use not permitted	0	3	10	4	0	1	40	6	0	0	3	3	0	70

Is employee charged for personal use of company vehicle?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S. — Yes	41	28	22	9	36	57	17	23	46	44	15	5	4	358
No	8	10	6	1	9	8	25	10	9	6	1	1	4	98

If drivers are charged for personal use of a fleet vehicle how are the charges collected?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
U.S.														
Expense Report	23	11	1	1	17	33	2	9	33	20	5	3	0	158
Salary Deduction	12	10	15	3	18	25	9	10	29	18	5	2	3	157
Others	8	6	7	5	4	5	7	6	4	13	7	0	1	73

How are employees charged for personal use of a company vehicle? What amount?

United States	Drugs & Cosmet.	Chem & Petro.	Public Utility	Commun.	Food & Bevs.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
Per Mile (Yes)	16	11	7	1	12	21	3	9	22	13	6	2	1	124
Avg. Amount (cents)	.181	.185	.206	.060	.124	.160	.217	.159	.186	.135	.178	.165	.190	.168
Weekly Charge (Yes)	2	0	3	1	4	7	3	4	4	3	1	1	0	33
Avg. Amount (dollars)	$50	0	11	8	13	21	18	16	12	16	3	3	0	$17
Monthly Charge (Yes)	8	8	1	0	11	9	2	4	17	13	3	2	1	79
Avg. Amount (dollars)	$49	48	35	0	50	77	20	45	48	67	75	33	40	$54
Combination of both cents/mile & weekly or monthly charge: (Yes)	8	0	3	0	2	6	0	1	3	5	1	0	0	29
Avg. charged per mile	.075	.000	.127	.000	.130	.038	.000	.060	.077	.072	.240	.000	.000	.091
Avg. Week (dollars)	$ 7	0	10	0	6	10	0	20	0	12	15	0	0	$10
Avg. Month (dollars)	$23	0	80	0	0	67	0	0	38	38	0	0	0	$45
Graduated scale: (Yes)	0	0	0	0	0	1	1	0	0	0	0	0	0	2
1. Amt. for 1st number of miles	.000	.000	.000	.000	.000	.000	.240	.000	.000	.000	.000	.000	.000	.120
2. Number of miles reimbursed at rate in 1	0	0	0	0	0	600	15,000	0	0	0	0	0	0	7,800
3. Amt. for any mileage over that in 2	.000	.000	.000	.000	.000	.090	.110	.000	.000	.000	.000	.000	.000	.100
Other	14	15	11	8	12	21	10	10	18	18	8	0	1	146

hicle to and from work.

Although personal use of company vehicles is widely allowed by responding fleets, employees must pay for the privilege at more than 78 percent of the companies.

Thirty percent of fleets charging employees for personal use do so on a "cents per mile" basis with an average charge of 16.8 cents/mile. Nineteen percent charge a flat monthly fee averaging $54; eight percent charge an average of $17 per week; seven percent charge nine cents a mile and either $10/week or $45/month.

Fleets are divided though, on collecting charges for personal use of company vehicles. Over 40 percent use an expense report and 40.5 percent use salary deduction.

How are employees reimbursed for business use of personally owned vehicles when their assigned fleet vehicle is inoperable?

United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Beve.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
Per Mile (Yes)	41	30	28	12	40	55	47	31	58	42	13	8	7	412
Avg. Amount (cents)	.226	.234	.236	.224	.224	.225	.221	.217	.223	.211	.234	.216	.230	.224
Weekly Payment (Yes)	0	0	0	1	1	0	0	0	0	2	0	0	0	4
Avg. Amount (dollars)	$ 0	0	0	75	55	0	0	0	0	338	0	0	0	$201
Monthly Payment (Yes)	0	0	0	0	0	1	0	0	0	0	0	0	0	1
Avg. Amount (dollars)	$ 0	0	0	0	0	230	0	0	0	0	0	0	0	$230
Combination of both cents/mile & weekly or monthly charge: (Yes)	0	0	0	0	0	2	0	0	0	0	0	0	0	2
Avg. charged per mile	.000	.000	.000	.000	.000	.090	.000	.000	.000	.000	.000	.000	.000	.090
Avg. Week (dollars)	$ 0	0	0	0	0	55	0	0	0	0	0	0	0	$55
Avg. Month (dollars)	$ 0	0	0	0	0	96	0	0	0	0	0	0	0	$96
Graduated scale: (Yes)	2	4	4	1	1	5	1	0	1	3	4	0	0	26
1. Amt. for 1st number of miles	.240	.240	.220	.240	.240	.230	.230	.000	.240	.223	.240	.000	.000	.233
2. Number of miles reimbursed at rate in 1	7,800	7,819	8,803	225	15,000	12,080	15,000	0	1,000	5,483	10,417	0	0	8,410
3. Amt. for any mileage over that in-2	.115	.125	.123	.115	.110	.110	.110	.000	.110	.107	.110	.000	.000	.115
Other	4	3	5	0	1	5	10	3	6	4	0	1	0	42

Is any portion of repair costs charged to employee if person other than employee is driving vehicle?

	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Beve.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
Yes	22	17	11	6	26	30	17	20	34	22	9	1	3	218
No	15	14	10	1	15	22	9	7	21	19	7	3	3	149

Is any portion of repair costs resulting from accidents during personal use charged to the employee?

United States	Drugs & Cosmet.	Chem. & Petro.	Public Utility	Commun.	Food & Beve.	Ind. Mfg.	Govt.	Service Org.	Insur.	Consum. Mfg.	Bank/ Finance	Elect.	Other	Total
Yes	11	7	1	3	16	16	6	16	14	12	3	1	2	108
No	38	31	27	7	29	49	36	17	52	38	13	5	6	348
If "Yes" how much:														
A. Full amount (Yes)	0	2	1	0	1	0	3	1	0	0	2	0	0	10
B. Fixed Share (Avg. %)	50.0%	0	0	0	0	0	0	0	0	0	0	50.0%	0	50.0%
(positive responses)	1	0	0	0	0	0	0	0	0	0	0	1	0	2
C. Dollar Amount (Avg.)	$256	280	0	100	136	217	425	200	117	163	500	0	0	$203
(positive responses)	4	5	0	1	7	6	2	5	6	8	1	0	0	45
D. Insurance deductible amount (dollars)	$230	0	0	175	200	236	0	250	175	275	0	0	225	$224
(positive responses)	5	0	0	2	8	8	0	9	6	4	0	0	2	44
Other	1	0	0	0	0	1	0	0	0	0	0	0	0	2

Eight out of 10 fleet managers who have employees with no assigned fleet vehicle reimburse those employees for business use of their personal vehicles on a "per mile" basis. The average reimbursement is 22.5 cents per mile. Less than five percent of fleet managers use a graduated scale of reimbursement with average fees at 23.2 cents/mile for the first 10,154 miles and 12 cents/mile thereafter. Four percent of fleet managers reimbursing drivers use a flat monthly reimbursement of $264; just over three percent use a combination of both cents/mile and a flat monthly or weekly fee, and less than one percent use a flat weekly payment.

Fleet managers report that when an employee uses his or her personal vehicle for business because his or her assigned fleet vehicle is not in operation, they usually reimburse the employee on a "cents/mile" basis. Almost 85 percent of these fleet managers said they reimburse drivers an average of 22.4 cents/mile. Just over five percent said they reimburse the driver 23.3 cents/mile for the first 8,410 miles and 11.5 cents/mile thereafter. Less than two percent reported that they use either a flat weekly or monthly payment or a combination of cents/mile and flat payments.

When an assigned fleet vehicle is not in operation, several transportation alternatives are available. Nearly one third of fleet managers allow drivers to use their personal vehicle, 32 percent allow them to rent a vehicle, and 28 percent allow them to use a pool vehicle.

Employees allowing spouses or licensed children to drive a company-owned vehicle had better beware: almost 60 percent of responding fleets said employees are charged for a portion of the repair costs sustained in accidents when someone other than the employee is driving the company vehicle.

However, employees seem to get a break if they are the one involved in the accident with the company vehicle. Only 23.7 percent of fleet managers say employees are charged portions of repair costs resulting from accidents. Those fleets charging the employee for the repair costs are most likely to charge the insurance deductible amount, an average of $224 per accident.

Only 10 percent of all responding fleet managers reported that the IRS (or equivalent governmental body) had conducted an audit of their personal use records. AF

1987 - 1989 Personal Use Survey Comparison

	1987	1988	1989
Total Fleets Responding	464	463	609
Total Vehicles	394,091	518,401	544,569
Company-owned	221,049	283,517	264,562
Leased	173,042	234,884	279,987
Personal use of company vehicle permitted by:			
Employee	89%	87%	87.7%
Employee's spouse	77%	65%	64.5%
Employee's licensed children	44%	34%	32.4%
Others	13%	5%	11.7%
No one; personal use not permitted	11%	13%	12.3%
Minimum age set for drivers other than employees for use of company vehicle for personal use	38.1%	35.9%	27.7%
Percent of monthly total fleet mileage considered for personal use	20.1%	20.7%	13.2%
Average personal mileage per driver per month (U.S.)	473	408	399
Employee charged for personal use of company vehicle:	80%	81.1%	78.5%
Charging method used for personal use of company vehicle:			
Per mile (kilometer)	45%	32%	28.4%
Weekly/Monthly rate	39%	33.3%	
Weekly rate (1989)			8.2%
Monthly rate (1989)			22.0%
Combination per-mile/weekly/monthly rate	15%	8.1%	6.9%
Graduated scale	NA	1.1%	0.6%
Other	NA	25.5%	17.6%
("Graduated scale" and "Other" option not given in 1987.)			
Personal Use Charges Collected Via:			
Expense report	68%	37.4%	39.0%
Salary deduction	73%	44.0%	43.4%
Other	NA	18.6%	17.6%
("Other" option not given in 1987.)			
Factors governing assignment of company vehicle			
Yearly business mileage	31.2%	24.4%	24.3%
Job title	45.2%	13.1%	48.9%
Fringe benefit	14.7%	53.5%	14.9%
Other	8.9%	9.0%	11.9%
Repair cost paid by driver because of personal use accident	38%	31.8%	26.0%
Full amount	5%	10.4%	9.0%
Fixed share (percentage amount)	.7%	2.1%	1.4%
Dollar amount	35%	45.8%	39.6%
Insurance deductible	41%	41.7%	45.8%
Other	18.3%	NA	4.2%
REIMBURSEMENTS			
Employees reimbursed for business use of personal vehicle — assigned fleet vehicle inoperable			
Per mile rate	96.4%	85.1%	83.6%
Weekly/Monthly rate	.8%	1.4%	
Weekly rate (1989)			0.9%
Monthly rate (1989)			0.2%
Combination of per-mile/weekly/monthly rate	.8%	.7%	0.4%
Graduated scale	2.0%	5.2%	5.4%
Other	NA	6.6%	9.5%
Employees reimbursed for business use of personal vehicle — no assigned fleet vehicle			
Per mile rate	90.8%	81.3%	82.6%
Weekly/Monthly rate	2.0%	4.8%	
Weekly rate (1989)			0.5%
Monthly rate (1989)			3.9%
Combination of per-mile/weekly/monthly rate	4.7%	3.1%	3.2%
Graduated scale	2.5%	6.3%	5.4%
Other	NA	4.5%	4.4%
IRS (or similar governmental body) audit in last 2 years	8%	7.3%	10.0%

Note: Some questions were re-phrased, making some comparisons unrealistic

USED CARS

The following are average used-car prices for the period ending July 5, 1989. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically in IBM machines. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of Automotive Market Report.

	AVERAGE AUCTION PRICE		
	Zone 1	Zone 2	Zone 3
87 BUICK SKYHAWK			
Cust Coupe	5178	5230	5074
Cust Sdn	5257	5310	5152
87 BUICK CENTURY			
Cust Sdn	6588	6654	6456
86 BUICK CENTURY			
Cust Sdn	5410	5463	5302
87 BUICK SKYLARK			
Cust Sdn	6539	6602	6409
86 BUICK SKYLARK			
Cust Sdn	5410	5462	5301
87 BUICK SOMERSET REGAL			
Coupe	6539	6602	6409
87 BUICK RIVIERA			
Coupe	9896	9995	9697
86 BUICK RIVIERA			
Coupe	8580	8665	8405
87 BUICK LE SABRE			
Cust Sdn	8276	8357	8108
87 CADILLAC DE VILLE			
Cpe	12,764	12,891	12,508
Sdn	12,920	13,050	12,663
86 CADILLAC DE VILLE			
Cpe	10,261	10,367	10,058
Sdn	10,397	10,502	10,190
87 CADILLAC SEVILLE			
Sdn	14,141	14,283	13,858
86 CADILLAC SEVILLE			
Sdn	12,755	12,880	12,498
87 CHEVY CAMARO			
Cpe	6678	6744	6543
86 CHEVY CAMARO			
Cpe	5679	5736	5566
87 CHEVY CAVALIER			
Sdn	4784	4832	4688
86 CHEVY CAVALIER			
Sdn	3902	3944	3827
87 CHEVY CELEBRITY			
Sdn	5915	5975	5797
86 CHEVY CELEBRITY			
Sdn	4708	4755	4614
87 CHEVY CAPRICE			
Sdn	6800	6867	6663
87 CHEVY CORSICA			
Sdn	5579	5637	5469
87 CHEVY BERETTA			
Cpe	6025	6086	5903
87 CHRYSLER LE BARON			
Sdn	5822	5880	5705
86 CHRYSLER LE BARON			
Cpe	4728	4774	4634
Sdn	4774	4822	4680
87 CHRYSLER FIFTH AVENUE			
Sdn	8937	9025	8757
86 CHRYSLER FIFTH AVENUE			
Sdn	7433	7507	7286
87 DODGE OMNI AMERICA			
Htchbk 5 Dr	3803	3841	3728
86 DODGE OMNI			
Htchbk 4 Dr	2912	2938	2852
87 DODGE ARIES			
Sdn	4702	4750	4607
86 DODGE ARIES			
Sdn	3670	3706	3596
87 DODGE DIPLOMAT			
Sln Sdn	5317	5369	5211
86 DODGE DIPLOMAT			
Sln Sdn	4299	4343	4211
87 DODGE 600			
Sdn	5557	5612	5446
86 DODGE 600			
Sdn	4568	4612	4473
87 FORD ESCORT			
Htchbk 4 Dr GL Series	4207	4248	4120
86 FORD ESCORT			
Htchbk 4 Dr L Series	3072	3102	3007
87 FORD MUSTANG			
LX-4 Cpe	5683	5740	5568
86 FORD MUSTANG			
LX-4 Cpe	4446	4598	4462
87 FORD TAURUS			
GL Sdn 4 Dr	6899	6969	6760
87 FORD TEMPO			
GL Sdn 4 Dr	4973	5023	4874
86 FORD TEMPO			
GL Sdn 4 Dr	3934	3971	3852
86 FORD LTD			
Sdn	4098	4143	4019
87 FORD CROWN VIC			
Sdn	8800	8888	8627
86 FORD CROWN VIC			
Sdn	7315	7389	7167
87 FORD THUNDERBIRD			
Cpe	7841	7921	7684
86 FORD THUNDERBIRD			
Cpe	6252	6314	6128
87 LINCOLN CONTINENTAL			
Sdn	14,429	14,572	14,137
Town Car Sdn	13,240	13,371	12,874
Mark VII Cpe	14,182	14,325	13,899
86 LINCOLN CONTINENTAL			
Sdn	11,701	11,819	11,467
Town Car Sdn	10,738	10,849	10,525
Mark VII Cpe	11,475	11,590	11,246
87 MERCURY COUGAR			
LS Cpe	8253	8335	8089
86 MERCURY COUGAR			
LS Cpe	6934	7003	6795
87 MERCURY TOPAZ			
GS Sdn 4 Dr	5008	5056	4904
86 MERCURY TOPAZ			
GS Sdn 4 Dr	3994	4034	3914
86 MERCURY MARQUIS			
Sdn	7927	8007	7770
87 MERCURY GRAND MARQUIS			
Sdn GS	9408	9501	9218
86 MERCURY GRAND MARQUIS			
Sdn	7927	8007	7770
87 NISSAN SENTRA			
Sedan 2 Dr	3962	4002	3881
87 NISSAN STANZA			
E Ntch 4 Dr	6283	6345	6156
87 NISSAN MAXIMA			
SE Sedan	9709	9602	9318
86 NISSAN SENTRA			
Std Sedan 2 Dr	2931	2960	2873
86 NISSAN STANZA			
GL Ntch 4 Dr	5015	5064	4914
86 NISSAN MAXIMA			
SE Sedan	7764	7841	7608
87 OLDS FIRENZA			
Sedan	5257	5310	5152
86 OLDS FIRENZA			
Sedan	4255	4296	4169
87 OLDS CIERA			
S Coupe	6571	6637	6440
Sedan	6647	6713	6513
86 OLDS CIERA			
LS Coupe	5282	5336	5177
LS Sedan	5347	5400	5243
87 OLDS CALAIS			
Sedan	6547	6611	6416
87 OLDS CUTLASS SUPREME			
Coupe	7573	7648	7423
Sedan	7573	7648	7423
86 OLDS CUTLASS SUPREME			
Coupe	6061	6111	5930
Sedan	5859	6111	5779
87 OLDS 98			
Regency Sedan	9692	9798	9499
86 OLDS 98			
Rgcy Sedan	7993	8071	7832
87 PLYMOUTH HORIZON			
Htchbk 5 Dr	3778	3815	3704
86 PLYMOUTH HORIZON			
Htchbk 4 Dr	2906	2934	2847
87 PLYMOUTH RELIANT			
Sedan	4716	4764	4621
86 PLYMOUTH RELIANT			
Sedan	3655	3690	3580
87 PLYMOUTH CARAVELLE			
SE Sedan	5402	5455	5292
87 PLYMOUTH GRAN FURY			
Salon Sedan	5304	5357	5199
86 PLYMOUTH GRAN FURY			
Salon Sedan	4318	4360	4231
87 PONTIAC SUNBIRD			
SE Coupe	5045	5095	4942
Sedan	4968	5017	4868
86 PONTIAC SUNBIRD			
SE Coupe	4174	4215	4090
Sedan	4141	4182	4058
87 PONTIAC 6000			
Coupe	6105	6166	5984
Sedan	6177	6238	6055
86 PONTIAC 6000			
Coupe	4888	4936	4791
Sedan	4945	4996	4848
87 PONTIAC GRAND AM			
Sedan	6768	6838	6632
87 PONTIAC FIREBIRD			
Coupe	6751	6818	6615
86 PONTIAC FIREBIRD			
Coupe	5751	5808	5636
87 PONTIAC BONNEVILLE			
Sedan	8303	8389	8136
86 PONTIAC BONNEVILLE			
Sedan	5640	5696	5527
87 PONTIAC GRAND PRIX			
Coupe	7606	7682	7455
86 PONTIAC GRAND PRIX			
Coupe	6136	6198	6012
87 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	5524	5578	5412
87 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8091	8173	7931
87 TOYOTA CRESSIDA			
Lux Sedan	11,640	11,754	11,405
86 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	4449	4495	4360
86 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	5985	6044	5865
86 TOYOTA CRESSIDA			
Lux Sedan	9095	9187	8913
87 VOLKSWAGEN JETTA			
Sedan 4 Dr	6279	6342	6153
86 VOLKSWAGEN JETTA			
Sedan 4 Dr	5260	5313	5156

CALENDAR

AUGUST

26-30—International Association of Fire Chiefs, Annual Convention, The Westin Hotel, Indianapolis, IN. Information: (202) 833-3402.

SEPTEMBER

7-9—Eighth Annual Land Mobile Expo East, Orange County Convention Center, Orlando, FL. Information: (303) 220-0600.

10-14—American Association of Motor Vehicle Administrators Annual Conference, Fairmont Hotel, New Orleans, LA. Information: (703) 522-4200.

13-16—National Association of Fleet Resale Dealers Fifth Annual Conference, Las Vegas Tropicana Hotel, Las Vegas, NV. Information: (213) 838-3168.

15-19—1989 International Baking Industry Exposition, Las Vegas Convention Center, Las Vegas, NV. Information: (202) 296-5800.

17-18—American Automotive Leasing Association's Mid-Year Meeting, Four Seasons Hotel, Chicago, IL. Information: (202) 223-2600.

20-22—Natural Gas Vehicles Conference, Hyatt Regency, Capitol Hill, Washington, D.C. Information: (703) 841-8661.

OCTOBER

5-7—Automotive Fleet & Leasing Association Mid-Year Conference, The Ritz-Carlton Buckhead, Atlanta, GA. Information: (213) 376-8788, ext. 77.

11-13—The 6th Annual International Maintenance Conference, The Westin Lenox, Atlanta, GA. Information: (404) 449-0460.

18-22—National Auto Auction Association Annual Convention, Marriott Hotel & Marina, San Diego, CA. Information: (402) 646-2170.

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GAS PRICES

UNLEADED

City	Cost Per Gallon Unleaded Full-Serve	Self-Serve
Montgomery, AL	138.9¢	114.9¢
Little Rock, AR	139.0	102.4
Santa Ana, CA	157.9	111.4
Washington, DC	149.4	112.2
Jacksonville, FL	147.2	109.5
Atlanta, GA	137.5	101.9
Maui, HI	185.6	142.9
Sioux City, IA	133.3	122.9
Indianapolis, IN	138.2	106.9
Duluth, MN	138.4	121.9
Gulfport, MS	133.9	109.2
Santa Fe, NM	138.9	119.4
New York City, NY	126.7	96.9
Portland, OR	124.6	N/A
Corpus Christi, TX	133.9	109.4

Survey conducted during the first five working days of July 1989.
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PULL-OUT CALENDAR

a bobit publication

september 1989

automotive FLEET

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

Enterprise's Outlook: Today and the Future

Dow's Lessor Loyalty

Used Car Survey

Class 3 Trucks

1990 Lincoln Town Car

Service Bodies

automotive FLEET®
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

BOBIT PUBLISHING

SEPTEMBER 1989
VOL. 28, NO. 11

Influencing the management of 4,720,000 cars and 2,000,000 light trucks and vans in business, leasing, rental, utility, government, police and taxi fleets.

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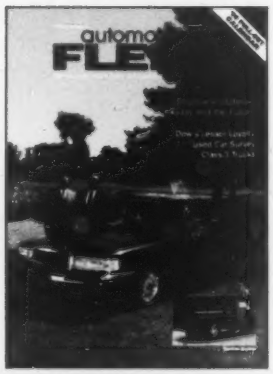

On the cover: Don Langefeld (left), leasing and fleet sales manager and John Treter, major leasing & fleet accounts manager for the Lincoln-Mercury Division, stand behind the newly-restyled 1990 Lincoln Town Car.

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In a continuing trend, fleets are putting more mileage on their vehicles in less time. For the second consecutive year that such statistics have been tabulated, auto auctions are the most popular method of selling used fleet vehicles.

NAFA's 1989 Used Vehicle Marketing Survey

Last year, fleets continued keeping their vehicles for shorter periods of time than their written replacement policies stated, but those vehicles had more mileage than in previous years.

For example, from 1986 through 1988, written replacement policies averaged 36 months/60,000 miles, but the actual average service life of fleet vehicles during those years was 32 months/64,540 miles in 1988, 31 months/64,350 miles in 1987, and 30 months/61,000 miles in 1986.

This year, a total of 235 U.S. fleets responded to the National Association of Fleet Administrators' 1989 Used Vehicle Marketing Survey. The results from this year's study are presented below:

Methods used to determine prices for each type of vehicle sold to employees in 1988.

U.S. Fleets	Cars	Light-Duty Trucks	Minivans	Total
Accounting (Book) Value	26 *	11	7	44
Auction Report	18	10	8	36
Automotive Mkt. Report	83	40	35	158
Black Book's Finance & Lease Guide	4	3	1	8
Black Book Weekly	19	11	6	36
Fleet Mgrs. Est. Mkt. Value	21	13	7	41
Galve's Auto Price List	6	2	3	11
Kelley Blue Book	17	9	4	30
Leasing Co. Est. Mkt. Value	27	16	12	55
NADA Used Car Guide	61	37	24	122
Red Book Used Car Valuation	10	2	3	15
Other	21	16	7	44

** Indicates number of survey respondents.*

U.S. Automobiles

Responding U.S. fleets said they sold 34,800 1986-1988 model year automobiles last year, most of which were 1986 models. These fleets said they recaptured 35 percent to 40 percent of the original cost of the vehicles. The fleets marketed the automobiles through sales to employees, auto auctions, wholesalers, used-car dealers, and other means.

For the second consecutive year that such statistics have been tabulated, auto auctions are the most popular method of selling used fleet automobiles. Almost twice as many automobiles were sold through auctions as opposed to selling the vehicles to employees, the second most popular choice.

When these fleets sell automobiles to their employees, one out of four uses *Automotive Market Report (AMR)* to determine resale prices. One out of five uses the National Automobile Dealers Association's *Used Car Guide* and only one of 10 uses their own accounting (book value) to set prices.

U.S. Light-Duty Trucks

U.S. fleets responding to this year's survey said they marketed 4,647 1986-1988 model year light-duty trucks last year, with nearly 40 percent being 1986 models. The average term in service for these vehicles ranged from 60.2 months/77,124 miles to 36 months/75,000 miles, which is in line with their written replacement cycles which average 60 months and anywhere from 60,000 to 75,370 miles.

Overall, responding U.S. fleets marketed 7,667 light-duty trucks (3,020 pre-1986 model year) through such avenues as employee sales, auto auctions, wholesalers, new-car dealers, and used-car dealers. More than one-third of these trucks were consigned to auto auctions, while another one-third were sold through wholesalers or brokers.

Employees purchased 10 percent of the light-duty trucks last year. Almost 25 percent of fleets selling these vehicles to employees used *AMR* to establish the selling prices, while one in five used the *NADA Used Car Guide*.

These fleets said they recapture from 20 to 30.5 percent of the original cost of their light-duty trucks when they are marketed.

U.S. Minivans

Responding U.S. fleets said they sold 1,876 minivans last year overall. Of these, 1,401 were 1986-1988 model year minivans, almost 700 being 1986 models. The average lifecycle for these vehicles ranged from 30 months/60,000 miles to 40.5 months/66,804 miles. These parameters, too, are in line with their written replacement policies, which ranged in average from 36 months/60,000 miles to 49 months/66,992 miles.

More than half of the fleets in this survey reported marketing the minivans through auto auctions, and nearly 15 percent sold to employees. In those cases of employee sales, nearly one-third of the fleets used *AMR* to determine the vehicles sale price. One out of five used the *NADA Used Car Guide*.

These fleets say they recapture anywhere from 33 to 40 percent of the original cost of the minivans when they are marketed.

Indicate how many of each specific type of vehicle for each model year sold in 1988:

U.S. Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manf.	Govt. & Law Enfor.	Service Org.	Insurance	Consum. Manf.	Banking/ Financial	Elect.	Other	Total
Cars:														
Model 1986	2,622	1,344	260	33	1,960	1,577	2,240	266	2,071	1,922	477	No Response	6	14760
Model 1987	1,793	1,154	186	17	1,425	1,465	1,847	224	1,497	2,753	75		3	12439
Model 1988	1,129	1,012	139	15	1,267	1,105	1,929	104	249	651	1		0	7601
Lt. Duty:														
Model 1986	7	889	230	3	204	24	315	41	15	44	37	No Response	No Response	1809
Model 1987	4	718	167	0	20	250	273	29	13	26	5			1505
Model 1988	8	533	142	0	15	219	256	15	0	145	0			1333
Minivans:														
Model 1986	237	9	79	1	13	166	20	60	25	53	15	No Response	No Response	678
Model 1987	91	29	95	0	7	158	24	22	6	72	3			507
Model 1988	14	27	37	0	15	48	17	0	0	58	0			216
Total	5,905	5,715	1,335	69	4,944	5,012	6,921	723	3,876	5,724	613	No Response	9	40848

Indicate the number of each type of vehicle in your fleet:

U.S. Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manf.	Govt. & Law Enfor.	Service Org.	Insurance	Consum. Manf.	Banking/ Financial	Elect.	Other	Total
Cars:	14,114 (18)	6,157 (16)	17,780 (23)	808 (7)	9,408 (18)	20,062 (23)	26,115 (51)	3,960 (9)	26,732 (32)	14,435 (19)	2,374 (12)	No Response	523 (5)	142,468 (233)
Light-Duty Trucks	494 (11)	7,436 (14)	41,057 (23)	657 (5)	1,566 (13)	6,027 (18)	8,664 (47)	1,676 (7)	377 (17)	1,249 (8)	212 (11)	No Response	352 (2)	69,767 (176)
Minivans:	1,308 (13)	223 (10)	4,812 (19)	955 (4)	606 (11)	3,090 (19)	771 (37)	650 (6)	289 (16)	1,966 (13)	104 (7)	No Response	7 (3)	14,781 (158)
Total	15,916	13,816	63,649	2,420	11,580	29,179	36,050	6,286	27,398	17,650	2,690	No Response	882	227,516

Of the total vehicles in your fleet, indicate how many are:

U.S. Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manf.	Govt. & Law Enfor.	Service Org.	Insurance	Consum. Manf.	Banking/ Financial	Elect.	Other	Total
Company Owned	1,101	6,555	54,021	1,146	6,262	10,041	35,772	1,122	16,923	4,937	1,817	No Response	98	139,795
Leased	14,850	6,790	9,628	1,274	5,308	10,027	278	5,164	10,249	12,084	873	No Response	784	77,309
Total	15,951	13,345	63,649	2,420	11,570	20,068	36,050	6,286	27,172	17,021	2,690	No Response	882	217,104

U.S. Sales Totals

U.S. fleets represented in this survey marketed 40,848 1986-1988 model year vehicles last year: 17,247 were 1986 models, 14,451 were 1987 models, and 9,150 were 1988 models.

In total, these fleets sold 14,706 vehicles to auto auctions; 6,820 to employees; 6,176 to wholesalers/brokers; 1,232 to new-car dealers, and 10,309 via "other" methods. These fleets salvaged 500 vehicles.

AMR is used by 26 percent of respondents selling vehicles to employees to determine the vehicle's value. Another 20 percent use the *NADA Used Car Guide*, and nine percent use their leasing companies' estimated market value. Only seven percent use their own accounting (book value) to determine employee purchase prices. In 80 percent of these cases, it is the fleet managers themselves who determine which of the pricing guidelines will be used; leasing companies decide in four percent of the cases.

AMR sales figures are used by responding fleets 27 percent of the time to determine the success of their marketing efforts. Another 21 percent compare their sale prices with the going market value of the vehicles, and 20 percent compare figures with previously established internal standards. Only 13 percent of responding fleets do not measure the success of their resale marketing efforts.

Interestingly enough, only 48 percent of fleets marketing vehicles through auctions or wholesalers consign vehicles to a facility where it may obtain maximum resale value. The other 52 percent market their vehicles at a location close to a driver's location rather than one that is more profitable, but further away.

Reconditioning And More

According to the results, only six percent of all U.S. fleets in this survey "always" recondition their vehicles before they are sold. An equally small seven percent do so "often," and 20 percent "sometimes" recondition their vehicles. Another 35 percent recondition their vehicles "rarely," and almost one-third of the respondents said they never recondition their vehicles before they are sold.

For the almost 68 percent of U.S. fleets that reported reconditioning their vehicles to any degree, 70 percent spend less than an average of $300 per vehicle on reconditioning. Just more than 22 percent of these fleets have an average per vehicle reconditioning expense between $301 and $500; seven percent spend between $501 and $700; and only one percent spend more than $700 reconditioning each vehicle.

If a driver's employment is ended, nine times out of 10 his or her vehicle will be reassigned to another employee, rather than sold.

However, when fleet vehicles are sold, the fleet manager or fleet staff handles the title transfers in 46 percent of the cases represented in this survey. Leasing companies handle title transfers in another 40 percent of the cases, while "others" do so 12 percent of the time. Fleet service vendors only handle two percent of the title transfers.

Fifteen percent of U.S. fleets sell the majority of their vehicles during May, according to survey results.

Indicate the average number of months and miles for each type of vehicle sold in 1988:

U.S. Fleets	Drugs & Cosmetics	Chem. & Petroleum	Public Utility	Comm.	Food & Beverage	Indus. Manf.	Govt. & Law Enfor.	Service Org.	Insurance	Consum. Manf.	Banking/ Financial	Elect.	Other	Total
Cars:														
Months in Service:														
Mean	26.7	33.6	73.3	36.0	28.4	27.4	51.7	39.8	28.9	25.9	30.4	No	37.6	39.2
Median	27.0	29.0	72.5	36.0	30.0	27.0	50.0	28.5	29.0	25.5	28.0	Response	36.0	32.0
Mode	27.0	24.0	48.0	24.0	30.0	24.0	6.0	24.0	24.0	24.0	24.0		36.0	24.0
Miles in Service:														
Mean	53,786	67,195	73,175	73,000	55,775	59,275	75,122	65,857	55,071	56,248	52,080		62,000	63,163
Median	54,250	60,000	75,000	60,000	60,000	50,500	75,000	75,000	54,575	56,000	50,000		62,500	60,000
Mode	55,000	60,000	75,000	59,000	70,000	50,000	55,000	75,000	50,000	48,000	50,000		50,000	60,000
Light-Duty Trucks:														
Months in Service:														
Mean	39.4	42.2	82.1	76.5	38.5	42.2	71.4	70.4	59.2	49.7	35.7	No	46.9	60.2
Median	36.0	36.0	84.5	76.5	32.0	36.0	66.0	54.0	50.0	42.0	35.5	Response	46.0	51.5
Mode	30.0	36.0	96.0	60.0	32.0	30.0	48.0	24.0	50.0	27.0	24.0		44.0	36.0
Miles in Service:														
Mean	62,200	84,701	80,170	123,333	70,275	73,945	76,907	82,285	57,750	79,130	65,622		107,500	77,124
Median	62,000	86,000	85,000	150,000	60,000	84,503	80,000	95,000	56,000	79,761	65,000		107,500	75,440
Mode	50,000	59,000	40,000	45,000	60,000	95,000	70,000	50,000	40,000	100,000	75,000		65,000	75,000
Minivans:														
Months in Service:														
Mean	25.8	26.4	58.0	No	23.0	23.7	70.7	50.4	33.0	30.8	34.0	No	30.0	40.5
Median	28.5	24.0	60.0	Response	26.0	24.0	60.0	30.0	33.0	31.0	36.0	Response	30.0	30.0
Mode	16.0	24.0	27.0		10.0	18.0	48.0	12.0	22.0	33.0	36.0		30.0	30.0
Miles in Service:														
Mean	58,267	80,697	84,568		53,876	59,556	72,679	70,000	49,000	59,090	66,166		[illegible]	66,804
Median	57,650	62,500	69,000		60,000	58,544	73,000	75,000	49,000	58,261	70,000		30,000	62,000
Mode	48,000	60,000	49,938		22,882	50,000	75,000	75,000	49,000	56,341	70,000		0	60,000